

The impact of Generative AI

~ Three possible changes that would
overturn the premise ~

EY Strategy and Consulting Co., Ltd.

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The EY logo, consisting of the letters 'EY' in a bold, white, sans-serif font, positioned next to a yellow diagonal line.

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Profile



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主な経歴

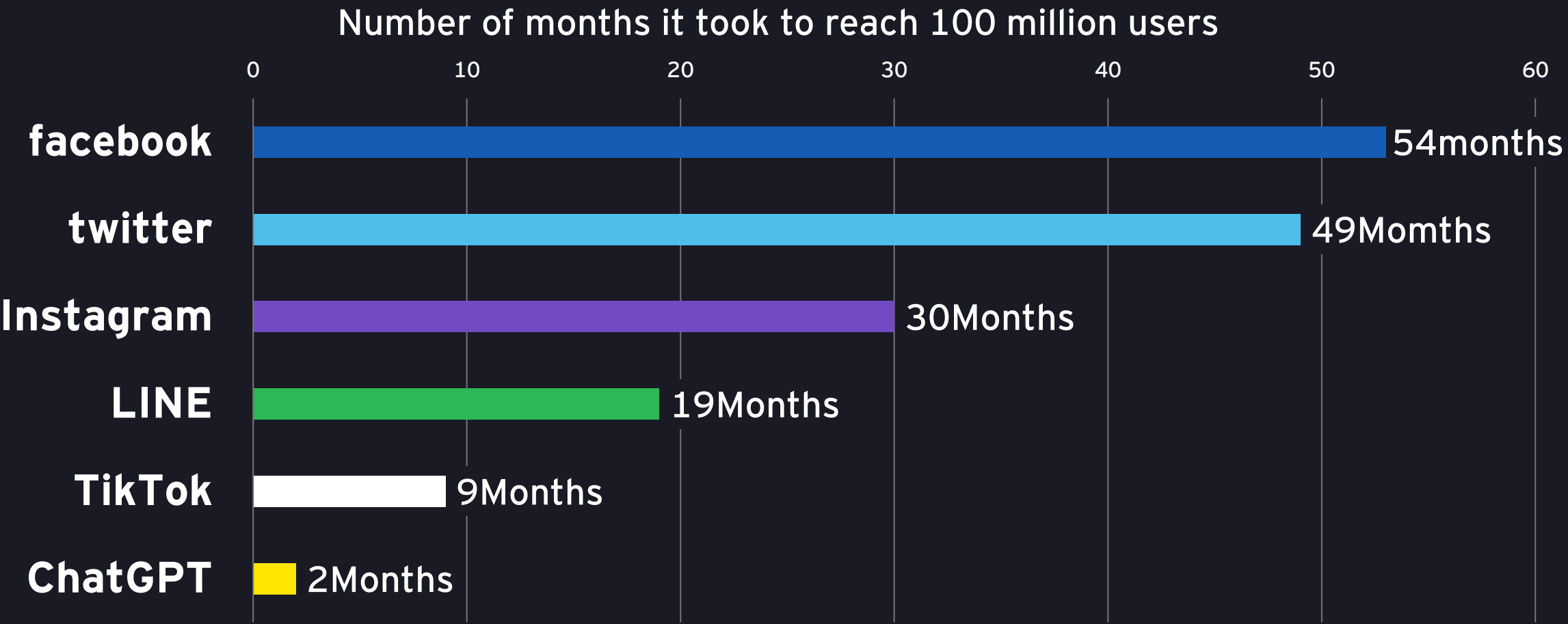
- Before joining EY, he worked for a government financial institution and a global consulting firm.
- In recent years, along with supporting policymaking for tourism, he has been playing a leading role in offering data utilization platform services in cooperation with local governments and tourism-related operators throughout Japan. Now he is recognized as one of the leading experts in ecosystem and platform businesses.
- Tama Graduate School Visiting Professor “Tourism For Economic Development and Human Development”
- Committee Member of the Japan Tourism Agency
 - Promotion of tourism DX
 - Functional enhancement for JNTO certified Foreign Tourist Information Centers
 - Secure and Train Local Tour Guide
- ² ■ Evaluator for Sustainable Countryside Stay Models Creation Support Program

Agenda

- Environment Surrounding Generative AI
- The Impact of Generative AI on the Tourism Industry
- What business strategies should be considered in the era of generative AI?

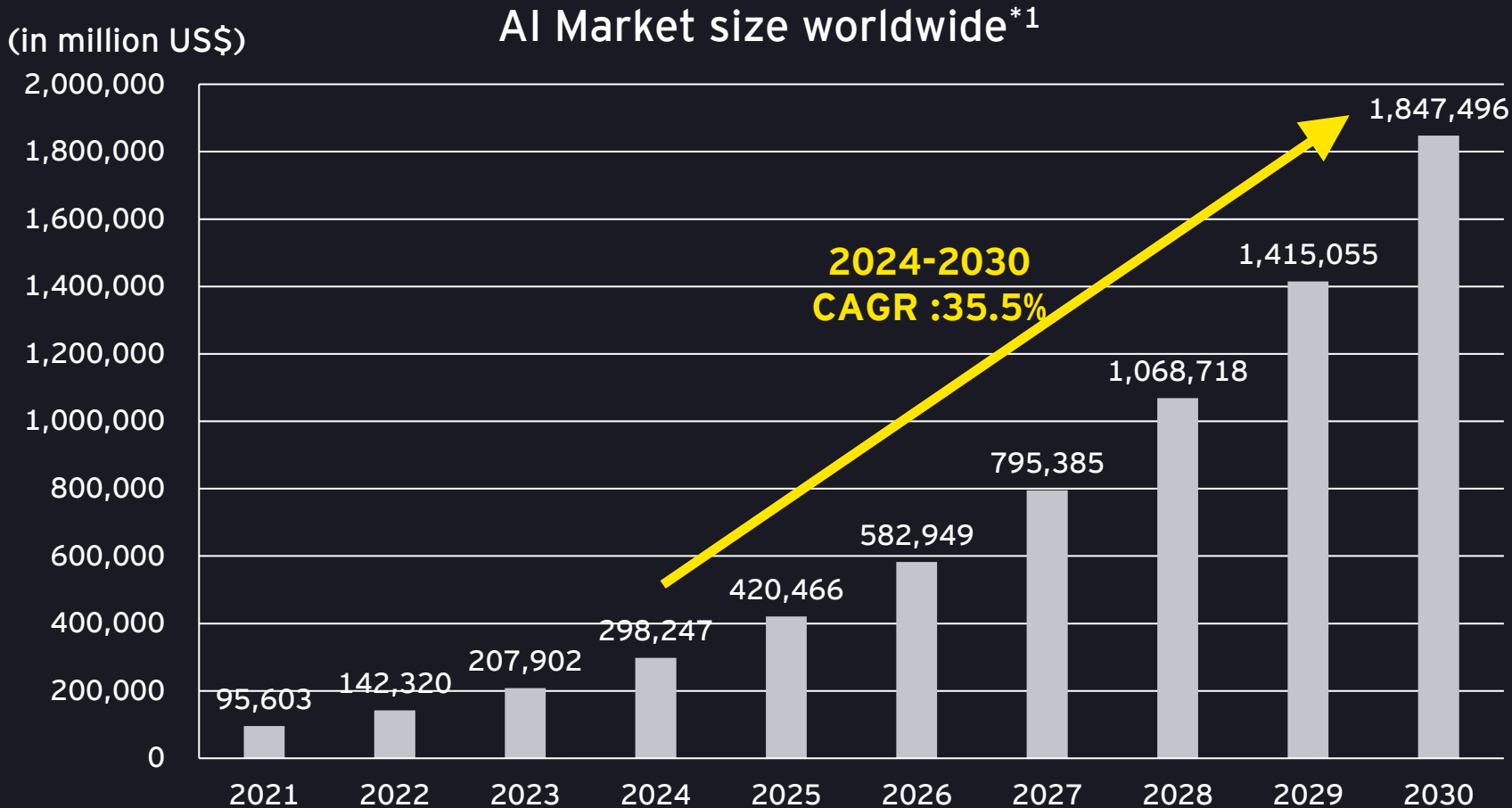
Environment Surrounding Generative AI

ChatGPT, famous for its generative AI, achieved 100 million users in just two months, a speed that can be seen as overwhelming compared to other well-known content.



Source: Prepared by EY based on various press materials

The market size for AI is accelerating and is expected to grow at a CAGR of 35.5% through 2030. Generative AI is expected to have a significant impact, with estimates of an additional 15-40% market boost and a 7% increase in GDP.



Generative AI could have an annual **economic impact of \$2.6 trillion to \$4.4 trillion** when applied industry-wide (an additional 15-40% of the economic impact of non-Generative AI)*²

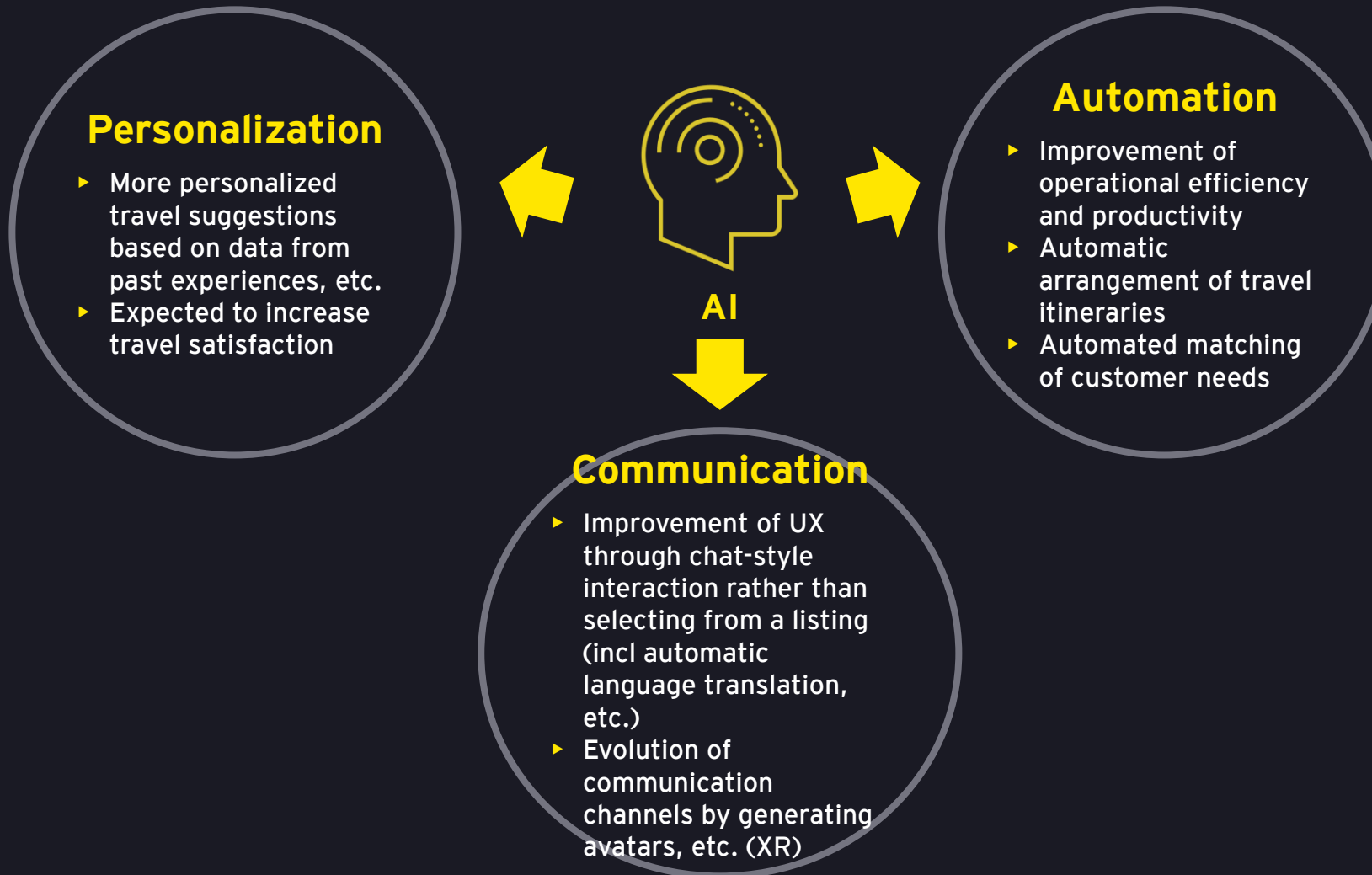
Generative AI could **increase global GDP by 7% (about \$7 trillion)** over 10 years and boost productivity growth by 1.5 percentage points *³

*1 Created by EY based on "Artificial Intelligence (AI) market size worldwide in 2021 with a forecast until 2030", STATISTA, <https://www.statista.com/statistics/1365145/artificial-intelligence-market-size/> (access on 19th April 2024)

*2 Created by EY based on "The economic potential of generative AI: The next productivity frontier", McKinsey & Company, <https://www.mckinsey.com/capabilities/mckinsey-digital/our-insights/the-economic-potential-of-generative-ai-the-next-productivity-frontier#business-and-society> (access on 19th April 2024)

*3 Created by EY based on "Generative AI could raise global GDP by 7%", Goldman Sachs, <https://www.goldmansachs.com/intelligence/pages/generative-ai-could-raise-global-gdp-by-7-percent.html> (access on 19th April 2024)

AI is expected to have a major impact in the areas of personalization, automation of work (efficiency), and deepening communication, and many efforts are underway.





Is this really the only impact AI will have?
Is there any impact that will disrupt existing business models?

The Impact of Generative AI on the Tourism Industry

Three changes caused by AI

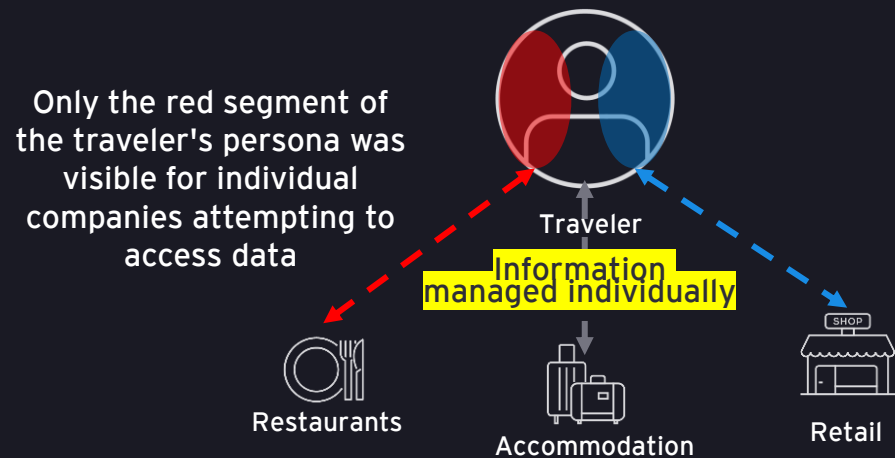
Three possible changes that could occur with the introduction of generative AI are ① a change in the vector of data collection, ② a shift in business models, and ③ a change in the human resources required.

Direction of Change		Background Issues
①	Changing vectors of data collection	■ Can we really dig deep into traveler personas in tourism, where data collection for personalization is attempted but limited in frequency? ■ Can small- and micro-scale operators other than major platformers participate in this trend?
②	Business Model Transformation	■ Are travelers really getting their needs met by the intermediary business of travel agencies and OTAs as in the past? ■ Will suppliers continue to wait for travel agencies and OTAs to send their customers without access to travelers themselves?
③	Changes in human resources required in the region	■ Is there a real need for data scientists and other advanced data analysis personnel in the region? ■ What kind of human resources do we really need?

① Changing vectors of data collection: fragmented real image of travelers

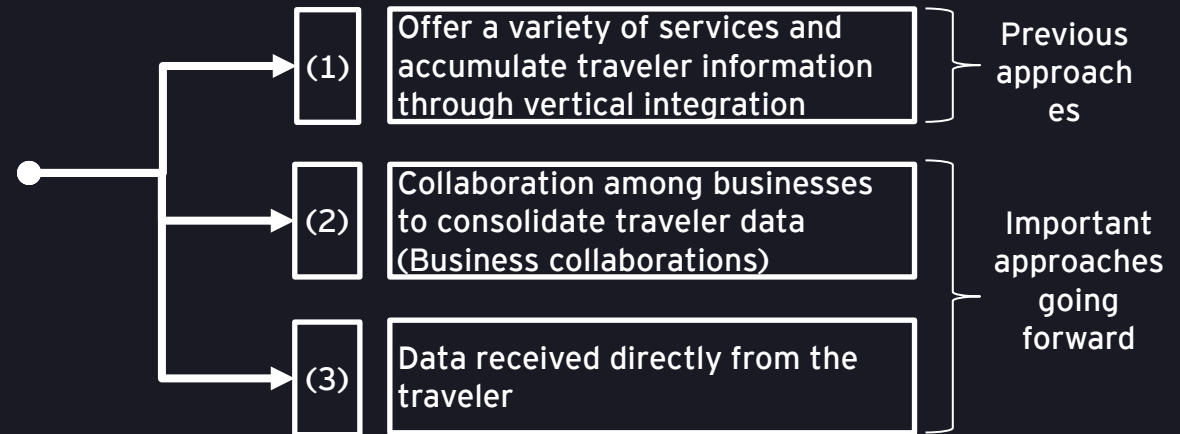
Currently, customer management is carried out on a facility-by-facility basis, which means that the traveler's image is captured only in fragments and the value of the customer experience is limited, making personalization a major challenge.

Challenges in current customer information management



- ▶ Each facility only gets a **"fragmentary"** glimpse of travelers, which obscures their true needs and **limits** the customer experience that can be offered
- ▶ When travelers conduct direct research on areas that match their desired destination, they may be unaware of the full range of attractions and services offered by tourist facilities, **creating a risk of reduced experiential value.**

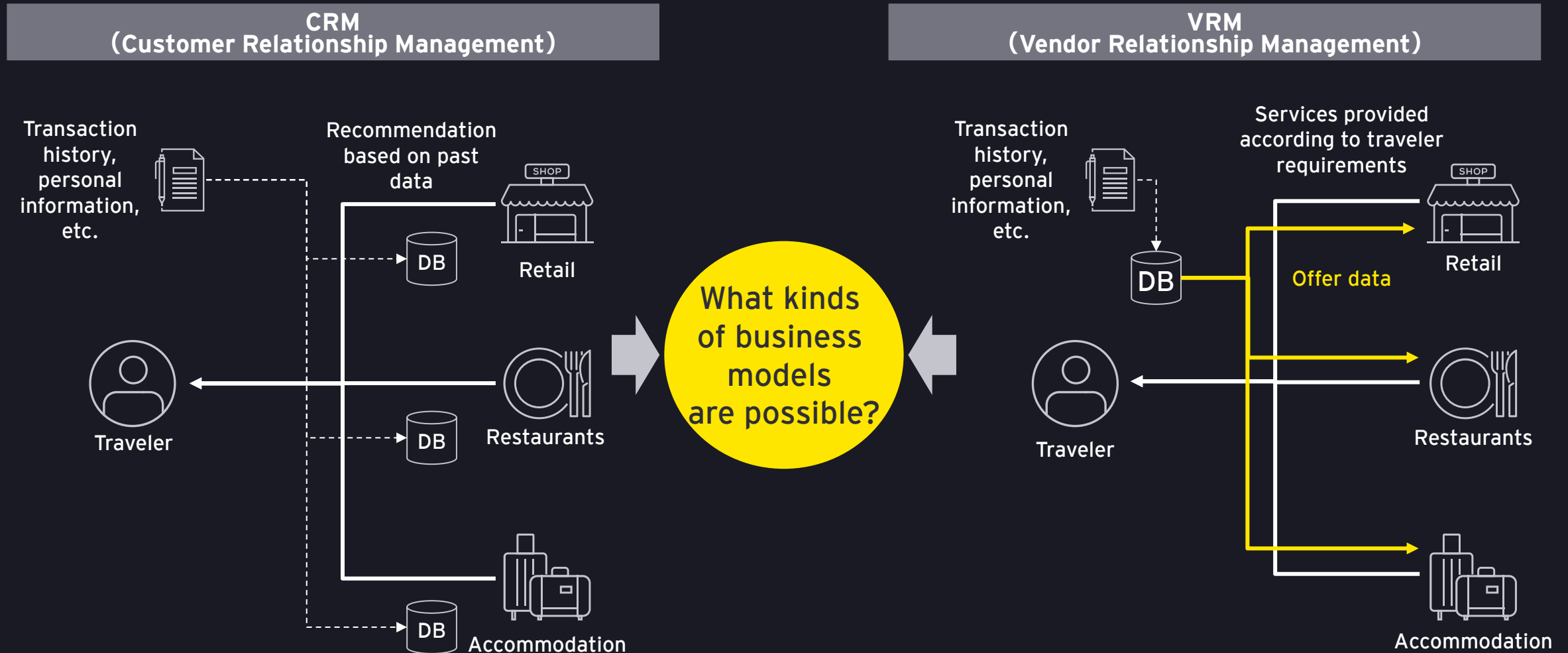
Approaches to obtaining traveler information



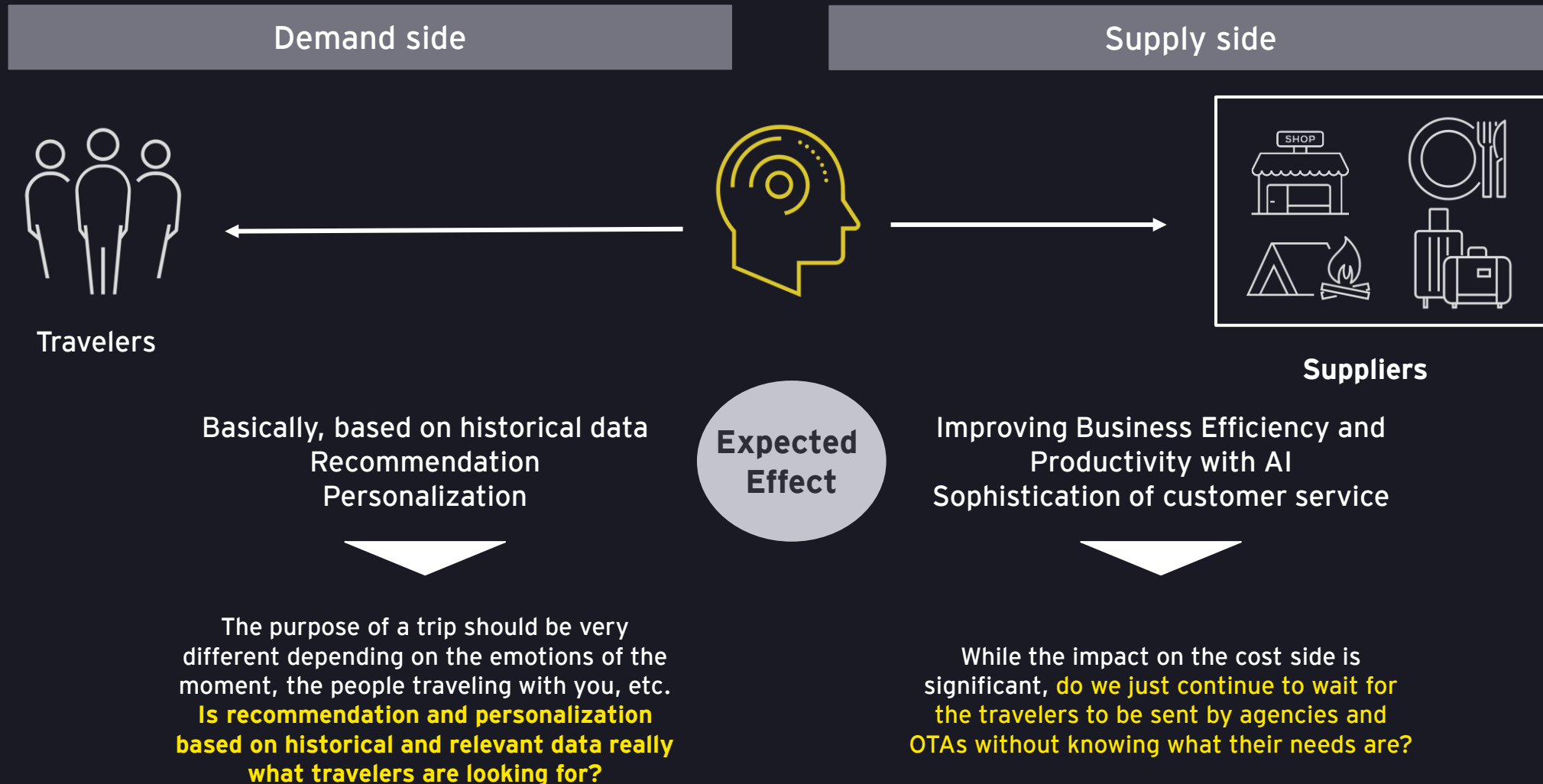
- ▶ By gathering data from travelers, it becomes feasible to not only chronicle their journey experiences but also to understand their emotional responses (perspectives) throughout their travels, which could lead to more personalized service offerings

① Changing vectors of data collection: new vectors of customer information management (VRM)

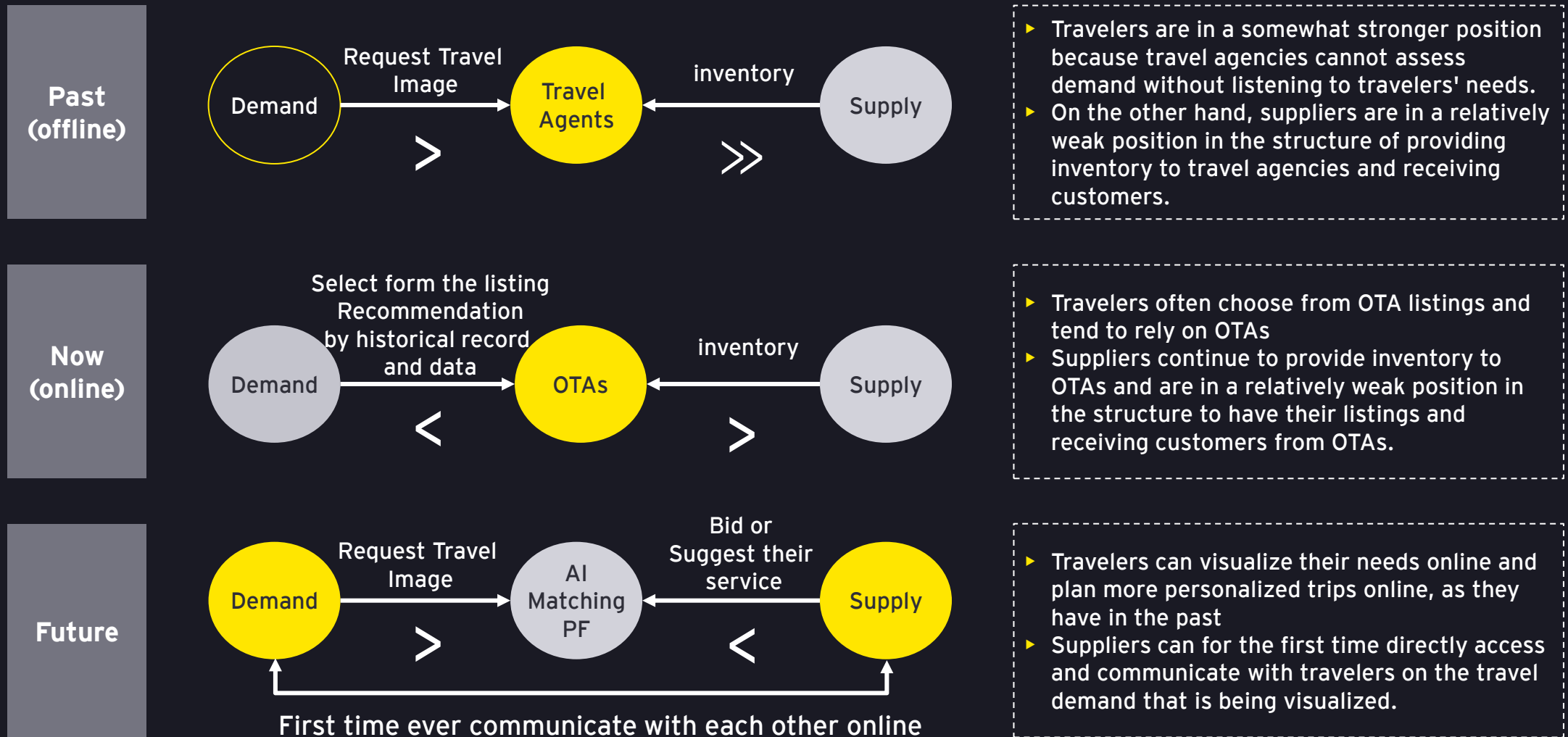
The concept of VRM, where individuals manage their own data and provide it to companies, rather than CRM, where companies collect, manage, and approach customer information, will become more important in the future.



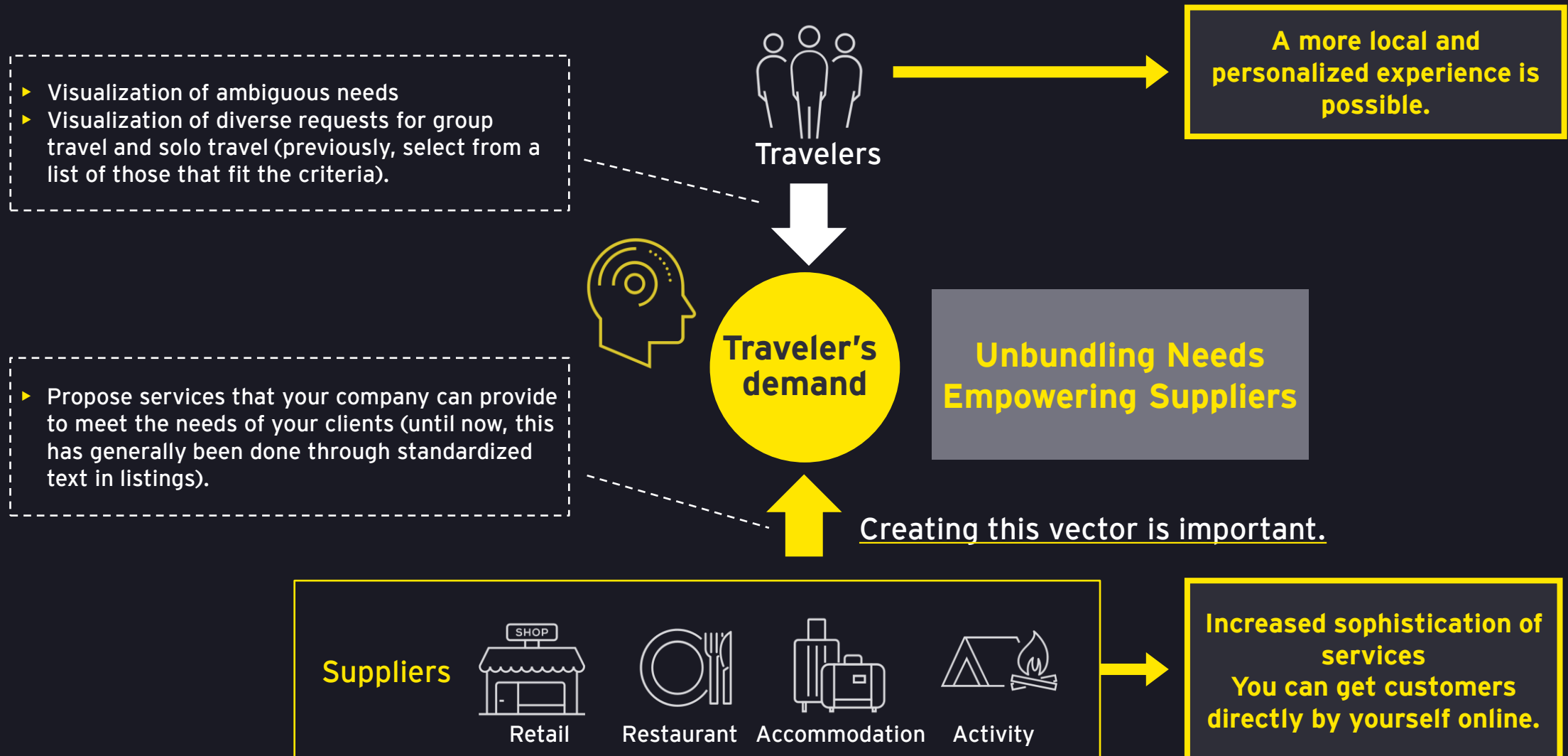
While AI is expected to increase recommendations, personalization, and operational efficiency, don't you really want to propose services that respond to dynamically changing demand and determine your own travel process, just like buying that day's dinner ingredients at the supermarket?



AI could bring back power to suppliers for the first time and the structure of industry could change dramatically.

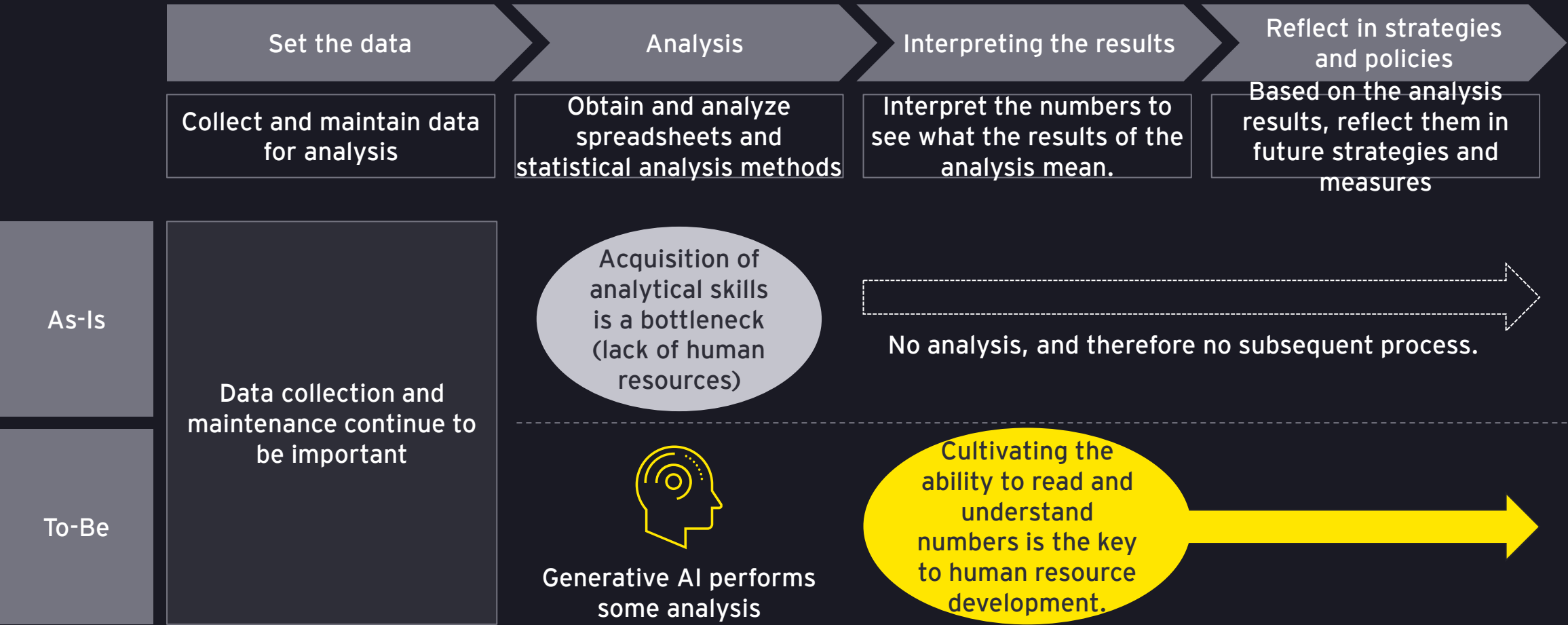


AI will facilitate supplier participation by visualizing and unbundling travelers' needs and will further accelerate the shift to an industry structure that empowers suppliers.



③ Changes in human resources required in the region: Toward human resources with the ability to read and understand data

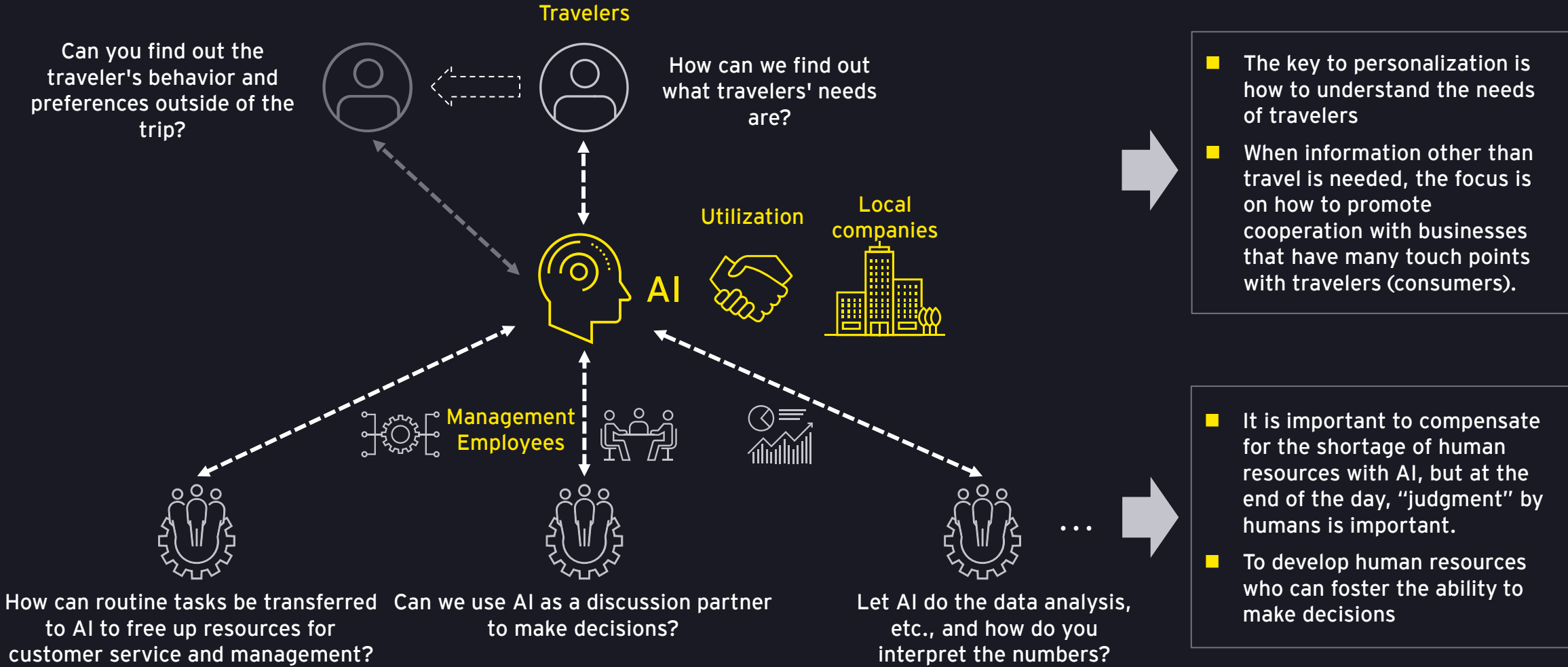
With the advent of generative AI, the human resources required have shifted from “how to analyze data” to “how to interpret data.”



➔ With the advent of generative AI, human resource development has shifted from “personnel who can analyze data” to “personnel who have the ability to read and understand data.”

What business strategies should be considered in the era of generative AI?

AI is just a tool, and it can be used as a mechanism to naturally draw out the needs of travelers or to compensate for a shortage of human resources, but at the end of the day, overall design based on collaboration among companies and human judgment is important.



The report on generative AI can be downloaded here



Access from here



Access from here

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